

**Raiser's Edge Orientation
NPCA Affiliate Group Network**

How to Create an Email using Raiser's Edge

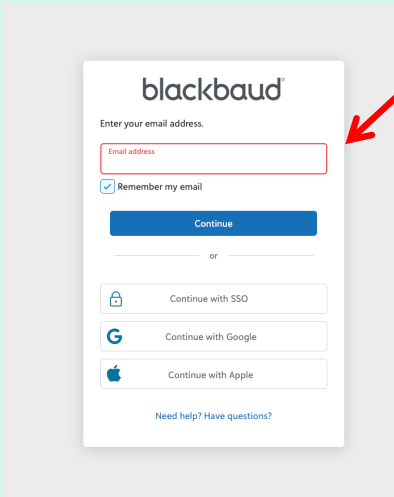
Updated: June, 2024



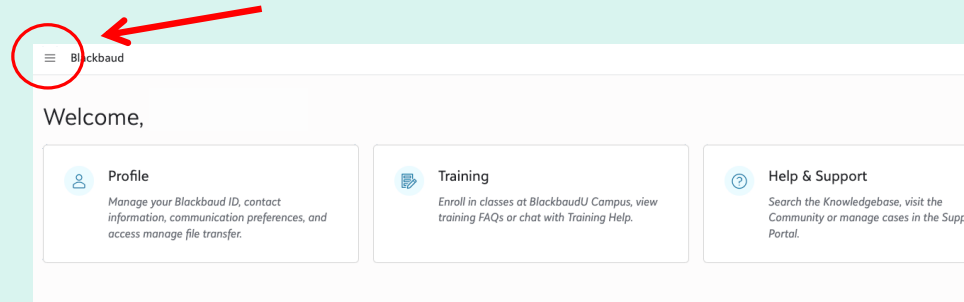
Logging into Raiser's Edge

- All groups have been provided their own unique username.
 - Once you have received your invitation to Blackbaud's Raiser's Edge by email, follow the instructions to complete your registration.
- To log in go to:
 - <https://app.blackbaud.com>

If you see this screen, log in with your credentials.



If you see this screen, click on the icon in the upper right and select "Raiser's Edge NXT".



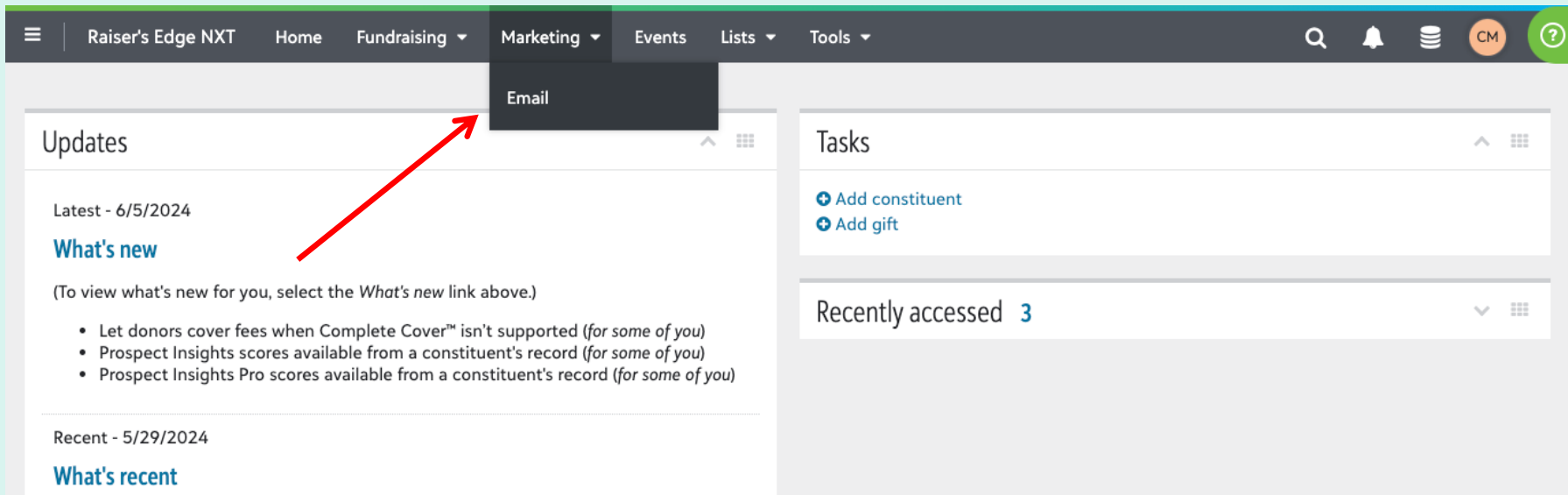
Email Best Practices for Groups

- The email tool is easy to use and is quite intuitive.
- Emails can be created by using the pre-built templates or from scratch.
 - Sent mail can be duplicated so you can easily use previously edited templates
- Always set the “From” and ”Reply-to” email address to your organization’s preference.
- Emails through Raiser’s Edge are only sent to saved “Lists”.
 - Another training covers how to create a list
- All received emails will show up on a constituent’s record under Email History.
- The email feature is open to all users of Raiser’s Edge and therefore all groups can see what other groups see.
 - Every group should name their emails with their group name first (i.e. Seattle - _____) so groups know whose email is whose
 - DO NOT Copy, Edit, or Delete an email that is not yours.
 - All Draft emails can be accessed by other users
 - Once an email is sent, it can be copied



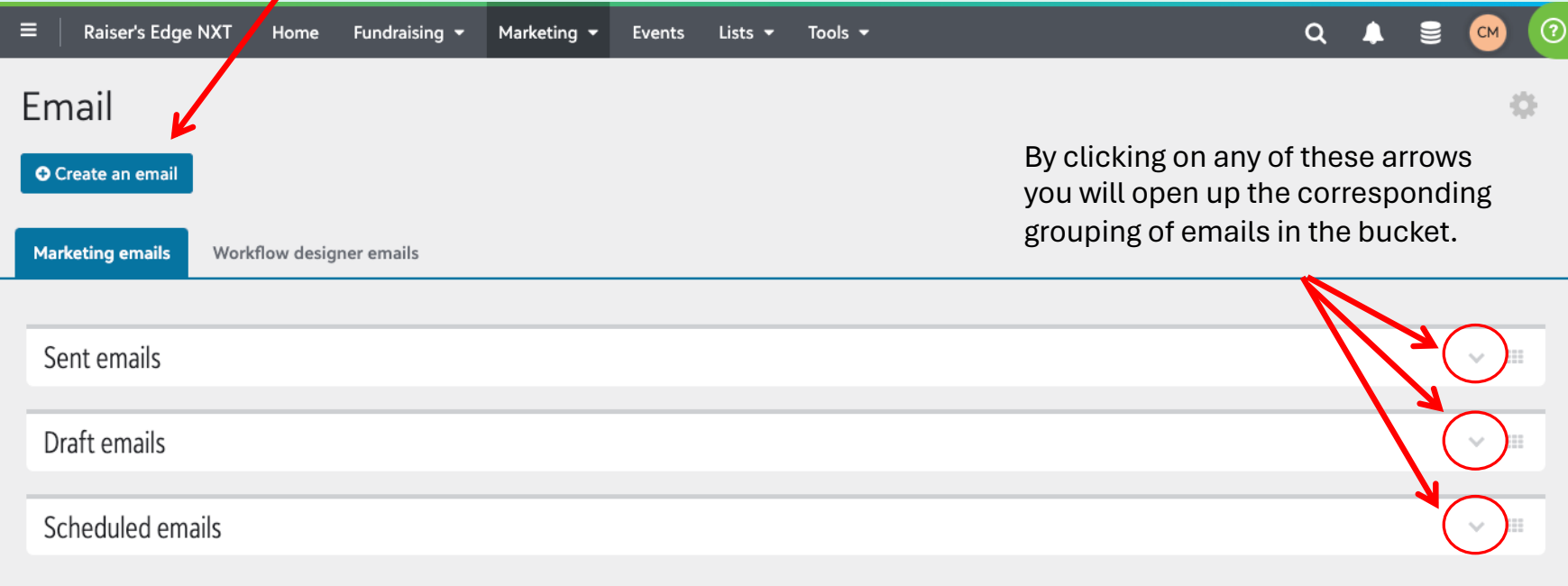
How to create an email

- The email function is listed under the marketing tab.
- You will access this by clicking “Marketing” --> “Email”



Creating an Email

STEP 1: Click “Create an email”



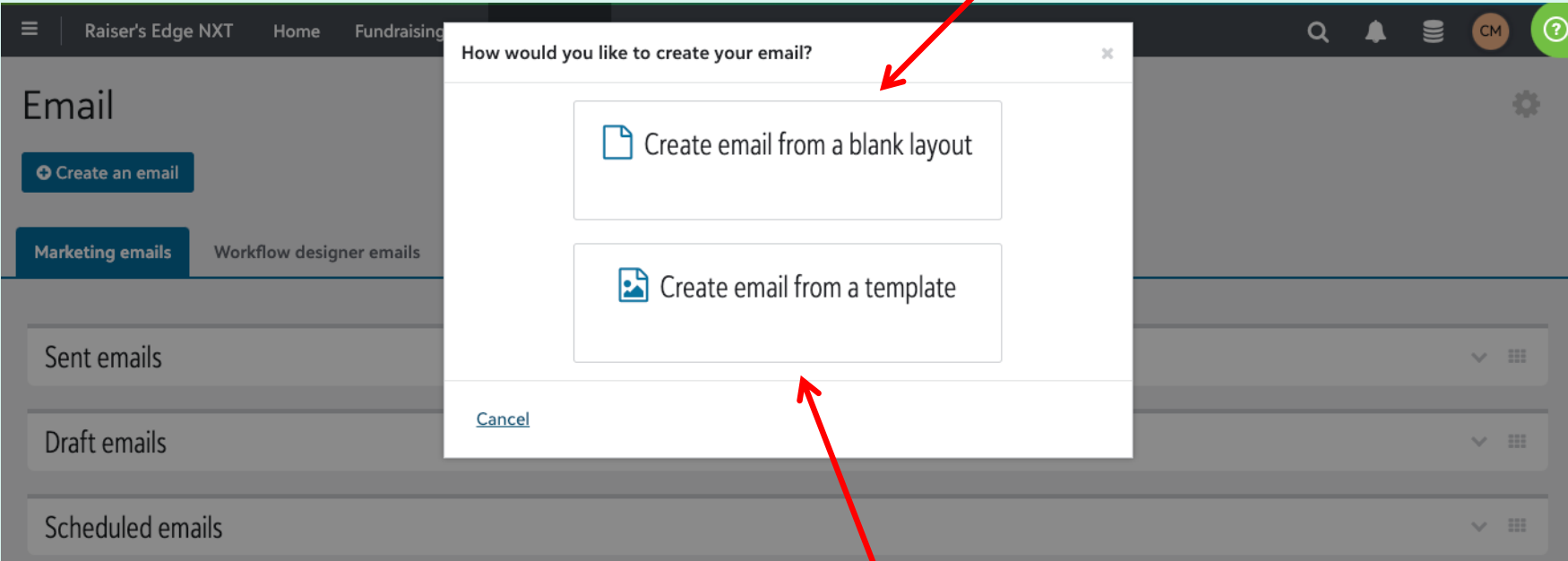
The screenshot shows the Raiser's Edge NXT interface. The top navigation bar includes 'Raiser's Edge NXT', 'Home', 'Fundraising', 'Marketing', 'Events', 'Lists', and 'Tools'. The 'Email' section is active, featuring a 'Create an email' button and two tabs: 'Marketing emails' and 'Workflow designer emails'. Below these are three email buckets: 'Sent emails', 'Draft emails', and 'Scheduled emails'. Each bucket has a dropdown arrow on its right side. A red arrow points to the 'Create an email' button, and three red arrows point to the dropdown arrows on the right of the 'Sent emails', 'Draft emails', and 'Scheduled emails' buckets.

By clicking on any of these arrows you will open up the corresponding grouping of emails in the bucket.

Creating your membership List

STEP 2: Choose your layout

If you want to start from scratch, you should start from a blank layout.

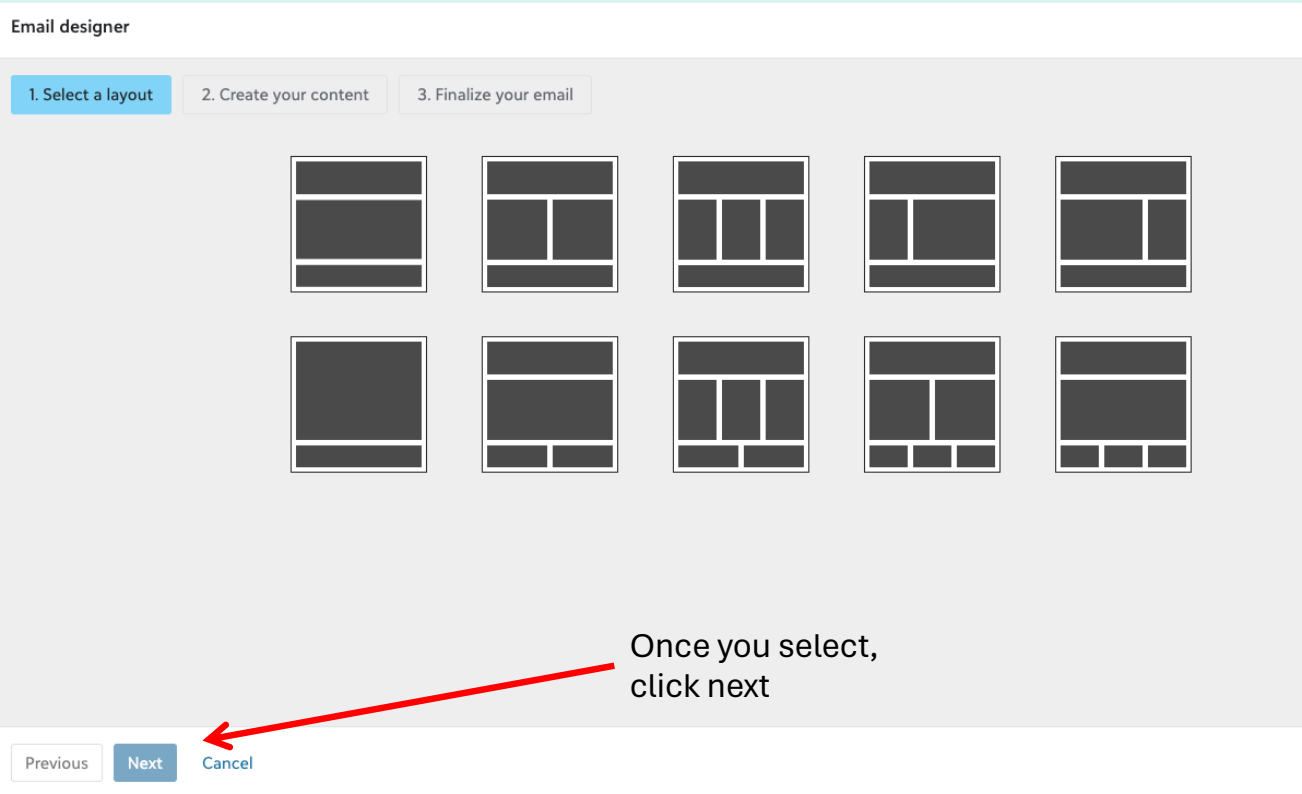


If you want to use one of the prebuilt layouts, you are welcome to use a template.



Creating an Email

STEP 3: Create a layout (if using a blank canvas)



No matter the layout you chose, you will be able to customize it in a variety of ways in the "Create your content" Tab.

Creating an Email

STEP 4: Adding content to your email

The screenshot shows an email designer interface. At the top, there are three steps: "1. Select a layout", "2. Create your content" (which is active), and "3. Finalize your email". The main workspace shows a template with a header section containing a dashed box labeled "abc | Text only" and two "Drag content here" sections. Below the header is a footer with an "Unsubscribe" link and the text "National Peace Corps Association npca@peacecorpsconnect.org". On the right, the "Email builder" panel is open, showing a "Content" section with a "Text only" option. A red arrow points from this option to the "Drop content here" section in the template. Another red arrow points from the "Text only" option to the "Next" button at the bottom of the interface. The "Next" button is highlighted in blue. Other buttons include "Previous", "Save and Close", "Preview", and "Cancel". The bottom right corner shows "Last saved 9:43 AM (CDT)".

By using the options in **Content**, **Columns**, and **Style**, you can customize your email to your own preferences.

Here we are seen dragging “Text Only” content into the “Drop content here” Section.

When you are done, click “Next”. If you want to save for later, click “Save and Close”.



Creating an Email

STEP 5: Finalize your email

This is the heading of your email. It indicates who the recipient sees the email is from.

We recommend sending yourself a test email before you send to your membership to see how your email look. This step is not required.

Every constituent record is required to have a primary email account, but a record can include many email addresses. We recommend to sent to “Email marked as Primary”.

Email designer

1. Select a layout | 2. Create your content | 3. Finalize your email

Set the purpose

Send this message as a one-time email
 Use this email for a workflow

Enter details

Internal email name *

From name *
National Peace Corps Association

From email address *
npca@peacecorpsconnect.org

Reply-to name
Same as above

Reply-to email address
npca@peacecorpsconnect.org

Email subject *

Send a test

Send a test email (Maximum of 10 recipients)

Enter email addresses separated by spaces or commas

Send test

Set who receives it

Recipient list *
Select a list...

Email address type
Email marked Primary

Schedule when to send

When do you plan on sending this email? *

Send it right away
 Send it at a later date

Previous | Send | Send Close | Cancel

Be sure to set the “From” and “Reply-to” email to your specific group’s contact information.

An email can only be sent to a saved ‘List.’ To learn how to save a list, check our training on Lists.

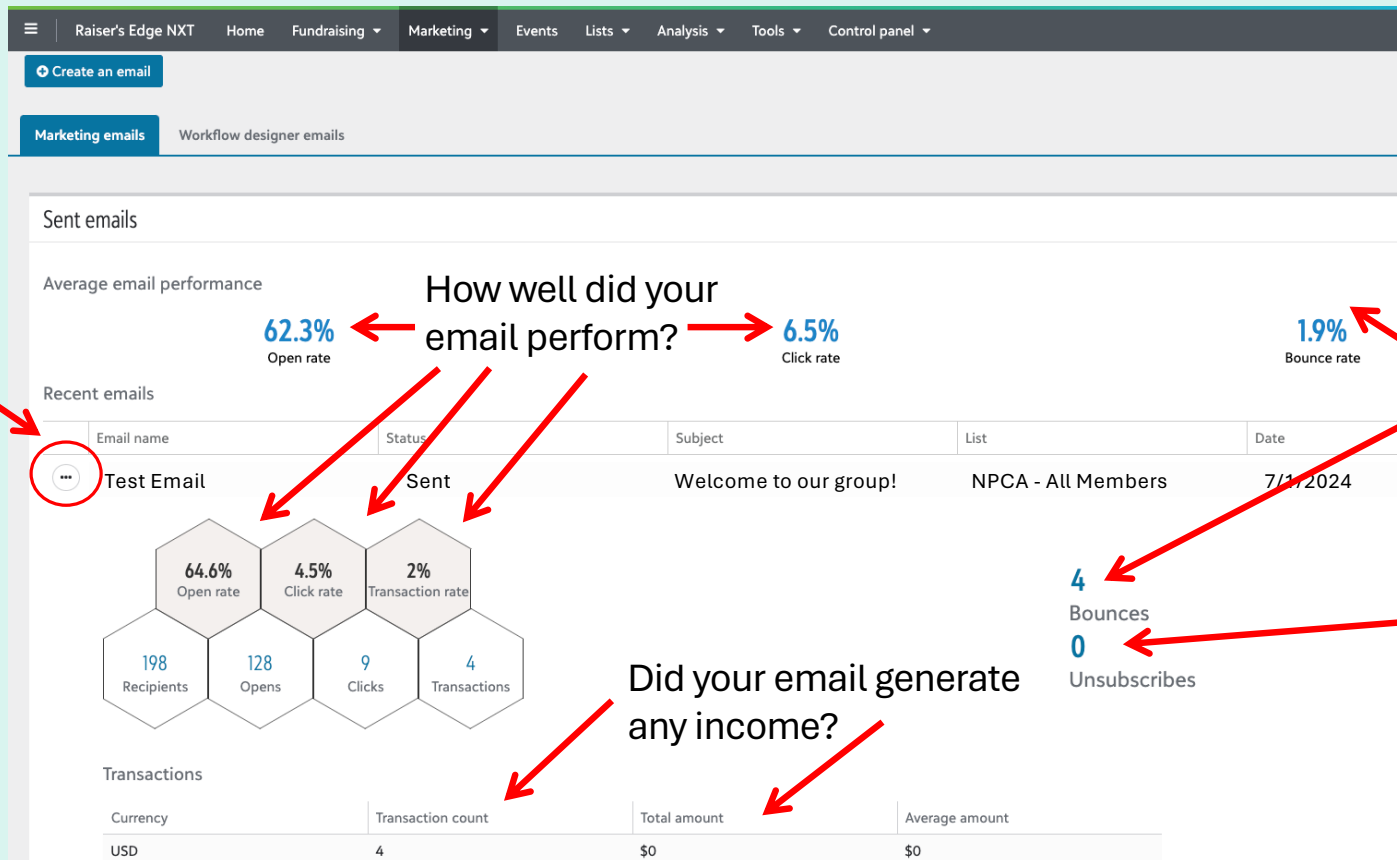
Send your email, or schedule to send it at a time/day of your choosing.



Creating an Email

STEP 6: Checking your analytics

After you send an email, you can track a variety of interesting analytics to track your communication's success! Many of the numbers are clickable to learn more.



Click here to copy your email to send a new email with the same format as the one before. After you copy it, start back at Step 4.

How well did your email perform?

How many of your emails did not go through.

Did anyone unsubscribe?

Did your email generate any income?



That's how you create a list in Raiser's Edge!

Other tools and Resources

- NPCA Affiliate Group Network Resources
 - <https://www.peacecorpsconnect.org/crm-migration/>
- New User Landing page
 - <https://hello.blackbaud.com/RaisersEdgeNXT-NewUser.html>
- View the free eLearning courses:
 - https://learn.blackbaud.com/learn/learning_plan/view/102/basics-of-raisers-edge-next

Thank you!

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